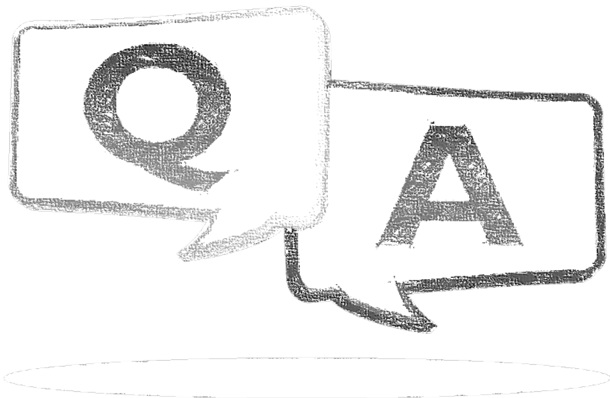

The Nonprofit Answer Book

HDG

Harvest Development Group

Do Good. Better.

The Nonprofit Answer Book

You have questions.

We have answers.

We know that working in nonprofit has so many rewards - personally, we have not found a better profession. In our many leadership roles within nonprofit, some of us since 1992, as well as our volunteer and board member experiences on numerous organizations, we have experienced the influence and impact of your work, and it is tremendous! The nonprofit sector is 5.5% of the U.S. GDP, employs over 10% of the national workforce, and generates about $400B in philanthropy every year! It's a powerful industry and you play a vital role in its success.

So, with the critical nature of this sector, we think doing good should not be hard. Period.

Most of the challenges you are currently facing have to do with *capacity* - your organization's capacity, your volunteers' capacity, your board's capacity, and your own. We know this because we have been where you are now: facing challenges without answers; symptoms without diagnosis; goals without a plan; solutions without resources.

We help you to identify the right challenges and find the right answers, then create the right solutions to build your resources and to eliminate any roadblocks to your success.

In line with our philosophy and core value of helping all nonprofits to Thrive, we have created a few ways for you to get the type of support you might need, at little to no cost to you:

- Our Mastermind Circles offer free, small group, virtual gatherings of nonprofit people, in regularly scheduled, facilitated, inspiring conversations around questions, solutions, and innovations on transforming impact.
- Our complimentary drop in virtual office hours on Tuesday and Thursday, with one of our expert consultants, are designed to give you the ability to literally ring our doorbell (or schedule a call) to be connected with us on a particular issue you might need answered, an idea you need to validate, or a temporary obstacle you need removed.
- Join us on Facebook! We have plenty of ways for you to stay connected, learn, and grow with your peers at our Harvest Facebook Page and also in our Harvest Groups:
  - Careers Blossom – a FB Group for professional development, recruitment, and position growth
  - Do Good Better – Our FB Group for innovation and creative ideas to meet your mission, grow your community, increase your income, and attract more advocates to your work.
- And this **Nonprofit Answer Book**, giving you answers to the most asked questions, followed by regularly delivered emails filled information, templates, webinars, panel discussions, exercises, and more on topics critical to your success. Each month brings a new area of expertise, with knowledgeable guides and applicable tools to bring

you to the next level in your performance, delivering impact to your organization.

We know “doing good, better” can be strategic, successful, and fun! And it should be easy to get the answers you need and the help you require when you need it. You can do this, and we can help.

So, congratulations on taking the first step by downloading this guide!

Stay tuned to your email box, as we deliver additional resources, tools, and guidance for each topic in this eBook, for a full year of experiences that will expand your capacity and build your competency in leading your organization to maximum impact!

If at any time you have questions or need more personalized help, join our Facebook communities, drop into our office, schedule a free time to chat, or register to be included in a Mastermind Circle. The possibilities to grow are endless!

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Month One- Strategic Planning

> “Strategy 101 is all about choices: you can’t be all things to all people.”
>
> -Michael Porter, American academic

Q: Why have a strategic plan?

A: Strategic planning is essential to an organization's sustainable and stable operations and growth. It defines a future that is built on data from where the organization, program, or department has been, where it wants to go, where it could go, and what other needs might be required in delivering its goals. The completed strategy then establishes a focus and a filter for decision making on where to apply resources and energy in delivering on the best solutions.

Strategy opens doors to innovation and creates networks that previously might not have been identified. And finally, it provides purpose, a pathway, and validation through measurements of the work being performed by the many dedicated members of your team!

Q: How do I create a Strategic Plan for my organization? For my board? For my fundraising? For my marketing and communications?

A: Wait- there needs to be more than one strategy? I need a strategy for various areas of my nonprofit? My teams? My departments? My programs? My Board?!? Yes, yes, and yes!

Creating Strategy involves three important things:

- Data. For your organization the data might be your historical performance, your community needs, and your capacity. For your philanthropy and fundraising it might be your donor persona, your database of past fundraising, and your programs/services impact. And for your board it might include their governance charge, their performance documents, and their purpose and impact. Data is essential in all strategy planning.
- A facilitated discussion on Purpose, Vision, Mission, and Values. Don't leave home without these. Each of these statements has a very specific function in your organization:
  - P**urpose**: The inspiring WHY of the organization, the program, department, or board and everyone in it (*Intentionality*)
  - **Vision**: A well-defined picture of your maximum self, concisely and enthusiastically illustrating your impact (*Future based*)
  - **Mission**: Detailed statement on what your organization is doing to reach the vision (*Present based*)
  - **Values**: A set of agreements on the way people behave toward others in and outside of the organization. These shape the culture and influence the outcomes of the strategy (*Normative*)
- Agreement on what objectives can lead you to your statements, as well as how strategy implementation will be measured, incrementally and overall. An important outcome of strategy planning is ensuring that any agreed upon actions and outcomes are evaluated and operationalized. These include metrics to monitor performance of people, tactics, and tools, as well as a timeline to measure against

Q: So how is this different from Project Planning? And which comes first?

A: Strategy planning differs from Project planning, in that strategy planning sets the table for the project planning to come. It's the overarching WHY, WHERE, WHAT, and HOW for any of your important and mission critical efforts. It always precedes Project planning.

There are 6 basic steps in Strategy Planning:

1. *Establish the purpose for the Strategy Planning*
2. *Gather insight: Understand where you are in this moment, where you have been, what exists or is missing, and how people perceive you.*
3. *Review data findings for reflections on current state*
4. *Define your Vision, Mission, and Values*
5. *Define 3-4 Objectives in your Strategy, their purpose, impact, and output*
6. *Document and Communicate the Strategy to Others*

What's Next?

Watch your email throughout this month for these additional resources:

- A step-by-step guide on preparing for and hosting Strategy Planning retreat.
- Our recorded video on the Strategy Planning process.
- And other special opportunities to guide you in Strategic Planning

Month Two – Project Planning Success

"Don't be busy; be productive."

- Unknown (but everyone)

You've developed your strategy and you have shared it with others. Now, if you want to make the ideas you created a reality, then Project Planning is the essential next step to production and success.

Q. Why is Project Planning needed?

A: A project or program should be well thought out with a purpose, an outline on development and execution, and the expected measurements that tell us along the way we are being successful. This type of plan is useful because it:

- Saves money. When you begin to act without a plan, there are many pitfalls that may not be considered and many opportunities missed that have not been explored.
- Reduces time. Having a plan outlined gives you the opportunity to see where you can create efficiencies.
- Informs others. A well-defined plan ensures that everyone understands the purpose, the actions, responsibilities, timelines, and resources.
- Creates a measuring tool. Knowing that you are on track, by measuring milestones along the plan's execution, helps you to iterate your plans to stay effective.

Q. Why start with Why?

A: When building projects for clients, the most common question they ask us is 'HOW?' How do we turn raw ideas and desired outcomes in our strategy into engaging, meaningful, and growth-oriented projects?

Our Answer is always- Start where you will end up.

Starting with the end and working backwards is key. Do not start with your idea or your product. Instead, start with WHY.

To be successful, the project you are creating should be either RESOLVING: fixing issues, driving change, modifying habits, bridging gaps, or INSPIRING: motivating, enabling and empowering ideas, action, and impact.

To accomplish this, you'll need to understand first-hand from your audience what is missing and what is required. When you're designing projects based on your ideas or product, you can end up relying on your own assumptions about your audience's needs, the types of resources they may or may not have access to, and what their motivation is to participate. You could build and launch entire projects before you realize they don't work. This is where **Design Thinking** is most valuable.

By starting with answering the simple question WHY- *Why is this project meaningful* – you are peeling back the tangible and tactical aspect of the project under development and uncovering the purpose. This purpose will frame and filter all of your decisions on design, content, and production, as well as marketing, resourcing, staffing, and delivery, for your project.

Q. What is Design Thinking and Why is it important?

A: When it comes to building great projects, design is the most important "feature." Once only thought of as a necessary component of visual art, web development, architecture, and engineering, it now has become an essential first step in all development: marketing campaigns, event planning, product development, service creation, training programs, and more. We've moved into the stage where design dominates — it's what sets companies apart and gives a real edge over competitors, including nonprofit companies.

Design Thinking in action is a process that leads participants central to the project, through a series of exercises that help to establish not only the PURPOSE of the project, but also the understanding of the problem being solved, the action to be inspired, the limitations or opportunities of the project idea, the solutions that meet those specific needs, and validation of design through testing.

DESIGN THINKING STEPS:

Stage 1: Empathize—Research Your Users' Needs.
Stage 2: Define—State Your Users' Needs and Problems.
Stage 3: Ideate—Challenge Assumptions and Create Ideas.
Stage 4: Prototype—Start to Create Solutions.
Stage 5: Test—Try Your Solutions Out.

The resulting documentation and strategies from this Design Thinking process are guides to all of the elements you will build and implement in your project.

What's Next?

Watch your email throughout this month for these additional resources:

- A tool to guide your project planning, with templates to capture the output from your discussions.
- Registration to our on-demand webinar on Project Planning.
- And other special opportunities to guide you in Designing and Planning your Project.

Month Three – Building Community: A Culture of Philanthropy

> "The greatness of a community is most accurately measured by the compassionate actions of its members."
>
> -Coretta Scott King

We all are in one or more communities in our personal and professional lives. Your neighborhood, workplace, school, your hobby groups, sports clubs, and kids' programs- all are communities to which you belong. We CHOOSE these communities because they have meaning to us. We STAY in these communities because we feel accepted, appreciated, and important to the communities' purpose. And we INVITE others like us to these communities because we love company!

The community you develop around your nonprofit is a core engagement tool for all of your mission work. But before we can define community, we have to understand what it means to be in community and how philanthropy is a goal of your community development. Your community builds your Culture of Philanthropy.

Q. I keep hearing about building a "Culture of Philanthropy", but I don't know what it means?

A: The word PHILANTHROPY has its origins in the Greek language and it literally means LOVE OF MANKIND. Philanthropy is an emotion that is evoked from an individual's experiences. It is the emotion of love, compassion, caring. As philanthropy grows, it inspires action to satisfy it- giving, helping, encouraging, guiding. This action is the end result of the "philanthropic culture" we build in our community. But the action is not the focus. Growing the philanthropy in your community is the goal. You grow philanthropy through Shared Experiences and Resources with your community, encouraging the same between community members, and building trust through intentional and consistent communications. It is through this nurturing and this encouraging of sharing among the people who have chosen your nonprofit and its community, that you members will grow in their attachment to your community and grow your community through engaging their own network.

Q. How can we go about growing our philanthropic community?

A: As with all projects in your department or organization, you start with a project plan. In your project plan for your community of philanthropy, define your audience. It's important that you don't place labels or boxes around your audience such as All Donors, All Families, All Corporate leaders. Your community is determined by WHO finds what you are doing valuable- and not everyone will- and among those that find you valuable, HOW do they find you worthy, both worthy of their investment and trustworthy of fulfilling your promised mission. The best way to find this out is to ask them! Surveys are a great tool to use in your known and unknown audience.

Understanding your community's shared purpose for being your community allows you to then consider and build shared experiences, shared resources and means of communication that are intentional and consistent, to build trust and deepen the philanthropic response of giving.

What's Next?

Watch your email throughout this month for these additional resources:

- Registration for our On-Demand Webinar, "The Woodstock Effect: Building your philanthropic community".
- Downloads to help you think about organizing and serving your community of philanthropy.
- And other special opportunities to guide you in building your Philanthropic Community.

Month Four- Data Driven Decision-making

> "Most of the world will make decisions by either guessing or using their gut. They will be either lucky or wrong."
>
> -Suhail Doshi, CEO, Mixpanel

In a recent study by the organization Nonprofit Hub, 90% of all respondents said they know that their organizations sometimes or always track data, while 49% said they don't know HOW their organization collects data, and only 5% said they use the data collected for decision making.

Q: We barely have enough time to deliver on our mission, how do we manage to implement data collection, assessment, and use in our work as well?

A: In reality, the time you will take to set up and maintain data collection, and then assess data in your decision making, will be re-captured from the reduction of the wasted time on bad results from projects you previously managed without the data. Efficiency gained. For instance, the data you collect on your donors, with consistency and process, will reduce the time you spend on trying randomly to ignite philanthropy in your donors to give. You will initially spend time establishing your CRM (Customer Relations Management database); defining the fields of data you want to collect and their purpose; establishing protocols, policy, and process on collecting the data; and training staff. This one-time investment will significantly reduce the time your team spends in guessing what to do with which donors, trying out your guesses, only to have them not work. The upside to getting ahead of your projects with data, is a stronger philanthropic community, more satisfied staff meeting goals with success, and more funding.

Q: In what ways can data help our organization?

A: Our message is always: Data drives everything, from staffing decisions, to governance, to budget, fundraising, marketing, program and services, communications, and advocacy. There are data points that will strength, lengthen, and expand every area of your organization.

For instance, data can drive deeper insight, better dissection, and a clearer illustration of your community- who is in it, why are they in it (purpose), what they value, and find worthy. Your data can also delineate their engagement patterns, allowing you to reach out at the time that your community is ready to hear from you, rather than when they are distracted or unengaged. Ways that we use data with our clients includes driving plans around: email and e-broadcast marketing, social media, donor engagement, website optimization, and volunteer management, as well as staffing resources and board development.

What's Next?

Watch your email throughout this month for these additional resources:

- Our Video Tutorial on Effective Data Management for philanthropy and fundraising.
- A tool for organizing and making Data meaningful to your goals (major donor data FAQ sheet).
- And other special opportunities to guide you in Data Management.

Month Five – Philanthropy and Fundraising

> "Remember that the happiest people are not those getting more, but those giving more."
>
> \- H. Jackson Brown Jr.

Understanding and defining your philanthropy strategy and your fundraising projects~~,~~ will bring clarity to your teams' efforts, illustrate for your board the financial forecast for fundraising, and provide measurable milestones to assess monthly, giving you more control over outcomes and return on investment.

Q: What is the difference between Philanthropy and Fundraising?

A: Philanthropy is an emotion that drives action. It is a noun, defined as "the desire to promote the welfare of others, expressed especially by the generous donation of money to good causes." We use the word philanthropy to illustrate the emotion we working to evoke in our community: Philanthropic Development, Culture of Philanthropy.

Fundraising is an action, a response of the philanthropy (feeling) that is evoked from your community engagement. To 'do' fundraising is to strategically create systems and mechanisms that capture the action driven by the rise in philanthropy and the managing of the data from the fundraising actions.

Q: How are Philanthropy and Fundraising developed in a nonprofit?

A: Previously, we discussed building a philanthropic community. The result of the work you do in evolving that community will result in generous contributions of time, money, and talent. This is where your fundraising strategy and project plans will be critical to the success of your philanthropic community work.

To be strategic in creating the mechanisms for fundraising, we think in terms of a Fundraising Funnel that illustrates HOW we **acquire** new donors from our community, how we **retain** them as donors and grow their giving over time, and how we **convert** some of them into larger investors into our work.

From this strategy, we define our programs as project plans in terms of donor impact: Annual Fund, Major Giving, and Planned Giving. Most **acquired** and **retained** donors will consistently live in and give through your Annual Fund. Some Annual Fund donors will be **converted** to larger investments into specific projects in a Major Giving and Planned Giving program.

What's Next?

Watch your email throughout this month for these additional resources:

- Registration for our On-Demand Webinar detailing how to build your fundraising funnel for action and measurement.
- A graphics tool to help you plan and organize your Annual Fund, Major Giving and Planned Giving projects.
- And other special opportunities to guide you in building and administering philanthropy and fundraising.

Month Six - Major Giving: Donors as Investors

"Goodness is the only investment that never fails."

-Henry David Thoreau

In studies on organizational health, nonprofits who were identified as having sustainable and reliable revenue from fundraising produced 80% of their revenue from only 20% of their donors. These donors provided large investments, most often pledged over a period of years, to programs that were influential and impactful to their mission.

Q. What is considered a Major Gift?

A: The term Major Gift is most often used in defining a larger investment into our organization – one that is well above the median or the mean of the average giving. In some organizations, determining the size of a major gift might include using the rule of 10X the average Annual Fund gift: $250 avg = $25,000 Major Gift. In other organizations, Major Gift levels may be equal to and above the highest individual board member gift. And finally, for other nonprofits, it's a set number- $5,000, for example- that identifies where its Major Giving programs begin. The point in this determination~~,~~ is to establish a level at which your organization will begin to shift their donor engagement plans, create a financial level to use in assessing your individual donors' capacity and interest to make a larger investment, and define financial criteria to build your fundraising forecast upon.

Q. How does our Major Giving program and actions differ from our other fundraising actions?

A: First, Major Giving plans and actions are designed around personal one on one interactions~~,~~ tailored to the donor's interests.

But meeting one on one with every single donor is unrealistic, no matter if you have 250 donors or 25,000. It is just not feasible. Here is where your donor data is a valuable asset – understanding from your data what you know of your donors, helps you discern who might be interested in a closer investment. These data points could include the amount they currently give through your Annual Fund, how long they have been giving to you, and the increased level of giving over their history. You would also look into their volunteering history with you, their attendance at your activities, conversations they have had with you, your board, the development team, or your program staff. This is why data management is so critical to the success of your fundraising!

Additionally, you might take a segment of your annual fund donors and regularly process them through a wealth screening tool. The reports from this review will help you to discern your donors' capacity.

With this data and the narrowed pool of prospects, your team can begin to create a more reasonable plan for one-on-one interactions, defining specific engagement and cultivation/solicitation strategies for each donor, including the people that should be involved, the dollar goal of the gift to be cultivated, what it might be toward, and the timeframe and steps to get there.

What's Next?

Watch your email throughout this month for these additional resources:

- A video tutorial on building a Major Gift Strategy.
- Templates for use in your Major Giving program.
- And other special opportunities to guide you in leading Major Giving.

Month Seven – Annual Fund: Acquiring, Retaining, and Growing our Donors

> "Consistency is the true foundation of trust. Either keep your promises or do not make them."
>
> -Roy T. Bennett

Annual Fund is the foundation of all of your fundraising activities. It encompasses the projects and actions you take in acquiring new donors, in keeping your existing donors, and in raising the individual and the overall annual fund donor giving average year over year. It is built on the organizations ability to prove impact- fulfillment, in quantifiable ways, of your program's effectiveness. How you deliver on your promise.

Q. How do we find new donors?

A: This is the most common question we get when we work with clients. "How do I go about finding and getting new donors?"

First let's talk about WHY donors give to you. As we reviewed in our community building chapter, there is a common PURPOSE among your community members. The purpose is defined by concept of VALUE and WORTH. Donors support organizations that work on mission or in areas that the donor values. This may be art, theater, or music. It could be social justice, animal rights, or ecological issues. Whatever it is, the donor is supporting you first and foremost because they care deeply about what you do.

Second to this~~,~~ is the donor's assessment of your worthiness. How do donors discern worth? First, are you trustworthy, do you manage your finances well (not skimpily, but well) and do you show the community with transparency how you do so? And secondly, but as important, are you delivering on your promise. Do you have an impact in the area of your mission? Is the impact meaningful? Can you show that meaningful impact in ways that inspire your donors?

Value and Worth are the two MOST important things you can concentrate on in building your Annual Fund.

With this framework, acquiring donors is then like any other marketing activity. Knowing your donor pools or 'personas' – why the give, where they live, who else they support, how they are connected to you – and using this data to build a marketing and communications strategy will act as a magnet for those individuals who find you Valuable and Worthy. Specific actions could include online activities, events, or market funnels that attract and drive your community to your website, social media page, or other online presence.

There are also some additional ways to acquire donors that include your existing base: Include network connection requests in your annual fund solicitations, ask your board to be a continuous source of new prospects, and ensure that you are capturing everyone that interacts with you- volunteers, family or friends of constituency, partner or grantee individuals into your annual fund database.

Q. How can we keep more of our donors over time?

A: As in any corporation, it costs more to acquire a new (prospect, donor, customer, client) than it does to keep them. So, retaining your donors is essential to your efficiency, sustainability, and scalability in fundraising. And retention is all about Shared Experiences and Resources and Consistent Communications (including regular solicitations).

In your community development plan, you have defined ways and actions you can perform to grow your community, keep them nourished and engaged, and evoke their philanthropic response. Many of these activities serve to retain your donors as well: Affinity group meetings or events that highlight your impact to a select group of donors interested in that particular program; regular, intentional, emails with critical information to share and information to receive from your donors; and of course, a scheduled and routine plan for soliciting donors through an appeal letter or email campaign (or 2 or 3) every year.

Working the Annual Fund donor community is more than a letter once or twice a year. It is a vibrant and interactive experience for your donors, one that will require full attention from your team but will result in a growing and consistent return on your investment.

What's Next?

Watch your email throughout this month for these additional resources:

- Registration for our On-Demand Webinar, Annual Fund.
- Excel tool to measure your performance on Annual Fund activities.
- And other special opportunities to guide you in building and launching your Annual Fund.

Month Eight – Virtual Gatherings

> "Virtual Gatherings are the best thing to have happened to nonprofits! Unlike any time before, virtual gives you the ability to bring your mission and your investors into a relationship."
>
> -**Sondra Dellaripa, President of Harvest**

In recent years, the pace and breadth of the 'new' adoptions and adaptations of how you work, where you work, and with what tools, makes it feel like you have been thrust into a technological squall - and the vision and plans for your gatherings such as board meetings, annual meetings, program presentations, fundraising events, and more with you! We know it all feels overwhelming, like you want to throw in the towel. But we're here to tell you – **you can do this!**

Q: What's the value of hosting our gatherings in a virtual setting?

A: Now let's set expectations right up front. Virtual events do not save you time or money over your in-person event. In many cases it will be as expensive, if not a tad more expensive, to start hosting your gatherings online. But we believe the outcomes that bring you admiration, the outputs of your return on this effort, and the ongoing engagement you draw from a virtual event is worth the investment.

Hosting your virtual gathering online is an unprecedented way to connect your constituency with your donors; it provides accessibility for people who cannot travel, it allows for more control in delivery without being restricted to a venue's availability, it creates evergreen material for your future use, and increases data collection, making your data more valuable for your work and to your sponsors and event partners. It also reduces your carbon footprint, always a wonderful benefit.

Q. What are some challenges to hosting a virtual gathering?

A: Audience engagement is the largest challenge when it comes to virtual events- how to make the participants sitting behind their screens, staring at your presenters, feel like they are connected. The next biggest challenge is interaction- how to encourage and drive participation involvement in your event. These two critical challenges are what we call "breaking the fourth wall". The fourth wall is the computer screen that exists between you and your audience as you share and host your gathering.

One good way to break that fourth wall is by not using pre-recorded video presentations in your event. Having your speakers and topic experts live onscreen, speaking in real-time and answering live questions is the single most important thing you can do to make that fourth wall evaporate. Yes, it's a bit riskier, they may forget their place, their presentation tools might not work, or they may receive questions that were not expected. But the virtual space for this type of interaction is more forgiving and more authentic. The real impact of hosting the gathering as a live production – creating intimate and meaningful interactions between you and your audience- is worth the risk.

What's Next?

Watch your email throughout this month for these additional resources:

- Registration for our On-Demand Webinar, "Planning for your Virtual Gathering".
- Downloads to help produce your next virtual event.
- And other special opportunities to guide you in hosting Virtual Gatherings.

Month Nine - Marketing and Communications

> "The single biggest problem in communication is the illusion that it has taken place."
>
> - George Bernard Shaw

Do not short shift your marketing and communications strategy! We know it's easy to believe that you don't have the time, the resources, or the talent to do your marketing and communications justice. But truly it is the most important business operations you can invest in, as it is in marketing and communicating that your drive brand and mission awareness, volunteer growth, philanthropic community growth, and advocacy success.

Q. How are Marketing and Communications viewed in nonprofit operations?

A: As with all business operations, driving awareness, influencing trust, and inspiring action on your brand and mission is central to your sustainability. It is not enough to do good work, to have impact, to be an agent of change. If no one knows about it, how do you grow your influence? Marketing and Communications are essential functional areas of your organization. Be sure to include them in your operational strategy and as an objective in all of your project plans.

Q: What are some things to consider in making Marketing and Communication a successful effort in my nonprofit?

A: Ensure your organization has an overall marketing plan that clearly identifies the 'journey' you audience takes in getting to know you, how they determine your value and worth, and how they decide to act on their feelings of philanthropy in some manner. What does that journey look like for your audience? It may even be different for different audiences: clients, granting partners, individual donors, volunteers, etc.

Building trust with these audiences is completed through communication. We have noted before that communication must be intentional and it must be consistent. That means that you should have a 12-month view on what specifically your audience is interested in hearing from you, how they receive their information, the schedule for keeping them in communication, and the authenticity in your messaging that tells your audience they are 'family'. Your community is adept at feeling your inauthentic connections: the templated newsletters that have equal parts on "All about us" and "Bragging on our team" is one good example. That's not to say a newsletter is NOT valuable. But make it community centric- all about **them** and what they care about and need- and make it personal- vlogs and first-person stories tell them you are approachable and that they are a valuable member of your organization.

What's Next?

Watch your email throughout this month for these additional resources:

- Registration for our On-Demand Webinar, "Marketing and Communications".
- Downloads to help plan and produce marketing and communications for your organization.
- And other special opportunities to guide you in Marketing and Communications.

Month Ten – Public Relations

"You are received the way you present yourself"
- **Bangambiki Habyarimana, Author**

There was a time when Public Relations was thought of as print materials, namely newspapers, with consumers purchasing papers at their local news stands or home delivery. In today's 24/7 news and social media environment, the adage "News travels fast" is an understatement. Now, more than ever, it is important for nonprofits large and small to have a public relations strategy to keep your organization out in front and to keep your mission present with the public. Nonprofits, by the nature of their mission, have good news and important news to share. Using public relations and anchoring your brand, mission, impact, and message in the public arena will grow your community.

Q. What is Public Relations?

A: Public Relations provides a unique purpose and is different from your marketing efforts. It is important to understand the difference and how they coexist in your overall marketing and communication strategy.

As part of your overall marketing strategy, public relations is a third-party endorsement that you earn, it is what people end up saying about you after you share your story. Public Relations is focused on preserving and promoting your organization and serves to build your organization's reputation, trust, and public awareness of your value and worth by creating a narrative that can attract individuals who share your purpose, into your community.

Q. What are some key aspects of a solid Public Relations strategy that we should consider?

As with marketing and communications, public relations are a functional business area that someone should be responsible for on your team. If you're a smaller nonprofit with limited staff and a working board, perhaps a board member could be the authorized responsible party for leading the strategy and execution of your PR. Having a specific person is essential, in that public relations relies on building relationships. Your public relations actions will be better received and will be more often responded to, if you have spent the time to build trusting and respectful relationships with those in the PR industry- news media, print, and radio broadcasting specifically.

Ensure that your organization has its key messages developed- what do you say about your nonprofit, how do you show that you are acting on what you say, and who else can say this about you. Secondly, creating a system to continually track what is happening in the 'public square"- leveraging global or national news by applying its key message to your story is a valuable approach to garnering more publicity.

What's Next?

Watch your email throughout this month for these additional resources:

- Watch our video guide to "Public Relations".
- Downloads to help plan and lead Public Relations in your nonprofit.
- And other special opportunities to guide you in Public Relations.

Month Eleven – Professional Development for You and Your Team

> "To realize your potential, you must look beyond the end of yourself, realizing that where you end is most likely where you actually begin."
>
> - Craig D. Lounsbrough, Author and Life Coach

In our busy days filled with competing priorities and unrealistic deadlines, it is sometimes too easy, to ignore the need to 'sharpen the saw'. This phrase was coined by the late Stephen Covey, a pioneer in organizational effectiveness and efficiency. Sharpen the saw means "Preserving and enhancing the greatest asset you have – YOU. It means having a balanced program for self-renewal*."

The nonprofit industry has raised the alarm on the limitations of a nonprofits ability to grow, if capacity building of its leadership and team is not part of the overall strategy.

*From the website "https://www.franklincovey.com/the-7-habits/"

Q. How do I integrate professional development into our strategy in a way that supports our goals?

A: Begin with the end in mind – any professional development activities or projects you employ are first and foremost intended to grow an individual's capacity to do more, with more satisfaction, successfully. Therefore, begin by ensuring that your teams (and your) role and responsibility documentation, program strategy and project plans, and job description are in place and define the objectives of the position and the projects with clarity, milestones, and identified outcomes. Only once this is complete, can you then assess the portfolio for each person on your team-their role, their goals, their tasks- and determine categorically which areas could be served with capacity building support.

Q. What are some ways I can engage in professional development?

A: Here is a list of things to consider in building a professional development plan for yourself and your team:

- Check in regularly. Make the review of you and your teams' professional development needs a routine discussion. Consider things that happened that revealed strengths you might build on or gaps that could be filled.
- Stay clear and focused. Avoid shiny object syndrome, where your professional growth needs are absconded by the latest idea, hot news headline, or other people's agendas. The best way to do this is to document your professional development plan, with observation of need and actions to be taken, with timelines.
- Stay open to new ideas. Not all professional development learning is a course, a webinar, or a book. Sometimes it's an informal mentoring relationship, a co-worker with a strength in an area you or your team needs, or life experience.
- Make it fun and fitting within your schedule. Professional growth should not be stressful. It should be challenging and invigorating and satisfying, but it shouldn't cause undue stress on your already crazy lifestyle. Have an attitude of infinite growth and opportunity to receive the benefit of your experiences more fully.

- Document the experiences. Make a short note in your diary or calendar about what you did, why you participated, what you hoped to get from it and what you felt you received. This will be useful as you review your and your teams' progress quarterly toward goals.

What's Next?

Watch your email throughout this month for these additional resources:

- Watch our video, "Imposter Syndrome".
- Download our Professional development tool.
- And other special opportunities to guide you in Professional Development.

Month Twelve – Board Development

> "People are yearning to be asked to use the full measure of their potential for something they care about."
>
> -Dan Pallotta, American Entrepreneur

There is no more misunderstood relationship in a nonprofit organization than that between board members and executive leadership. Complicated by a sense of authority and control, management and interference, as well as respect and deference, the relationship between the board and executive director (or CEO, president, however the organization is structured) is one that has the potential to devastate or drive success.

Q. How do I get my board to….

A: That question has innumerable endings- give more, take more initiative, show up. We hear them all.

Ultimately, the answer is always the same: Empower your board and they will act. Give your board clear expectations, guide them in developing their own strategy for performance, encourage them to be self-aware through regular evaluation of their work, and they will own their role in a way that lends true value to the work you are pursuing in your organization.

A board's role is not to manage the leadership. It is to govern, inspire, and lead the organization to success. This partnership exists for the benefit of your nonprofit and your constituency. It is "Mission Centric", meaning it is focused on the mission of the organization, in terms of vision, purpose, and policies, and not on the organizations operations. High performing boards operate in partnership with organization leadership and staff. This partnership demands transparency. Sheltering your board or profiling your organization to only share positive messaging will deteriorate your board's ability to be functionally influential to your success.

What's Next?

Watch your email throughout this month for these additional resources:

- » Watch our video panel discussion, "From the Boards Perspective".
- » Download Board Development 'Three Phase Strategy'.
- » And other tools to guide you in Board Development.

This is the only the beginning…

"The end is where we start from."

-T.S. Elliot

By now, I am sure you are feeling more prepared, authorized, and influential in community engagement, fundraising, and board development. But this is not the end, only the beginning. With the foundation this Nonprofit Answer Book has provided you, you are ready to tackle each of these topics, assessing and integrating more complex ideas and techniques into your work.

We would like to offer some additional resources to you as you continue to grow. Every month, we will deliver additional resources to you through email, with tools, guides, and invites to go deeper into each topic covered here.

Plus, if you haven't yet taken advantage of our other programs and services, we invite you to explore what we believe, how we work with you, and why your nonprofit is positioned for great success, by heading over to our website at www.harvestdevelopmentgrp.com. There you'll find additional free resources, videos, on demand webinars, and eBooks to ensure you stay well ahead of your nonprofits growing needs.

You can do this. We can help.

Strategy to Do Good, Better.

Competence to Do Good, Better.

Confidence to Do Good, Better.

Leadership to Do Good, Better.

Guiding you to deliver on your nonprofit's mission with sustainable revenue and scalable outcomes.